

PROGRESS NOTE

Date: 10/06/2017

Resident: Kimberly and Marshall Williams

Case Worker: Jack Collins

Location: Shelter Office

Narrative:

CW met with Ms. Williams to begin the SSI application process. CW reviewed the process with Ms. Williams and explained how we would need to request medical and school records. Ms. Williams signed the SSA-1696 Appointment of Representative form, the SSA-827 Authorization to Disclose Information and a general Release of Information form so that we could begin requesting medical and school records. We also did some paperwork for General Assistance and got back on a waiting list for subsidized housing.

CW and Ms. Williams called the SOAR liaison at the local SSA field office to set Marshall's protective filing date. CW let him know that Marshall intends to file for SSI. We scheduled a phone appointment to complete the SSA-8010 (Statement of Income and Resources) to document Ms. Williams' income and resources on November 10, 2017 and CW let him know that we will complete an SSA-8000 (SSI Application) for Marshall on paper to submit with the application. CW let him know that we would do the Disability Report-Child online and CW would deliver a complete packet of other signed forms following the phone appointment.

CW called the school to request that Marshall's teachers complete the SSA-5665 Teacher Questionnaire. Spoke with Catherine Davis, his Primary School Teacher. She agreed to complete the form. She will also consult with the Classroom Aide, Jackie Melendez. Ms. Davis gave me the information for how to request IEP records from the Some City Public Schools District Office. Ms. Davis mentioned that her records indicate that Marshall had speech, language, IQ, and psychological testing this past June 2017.

Places to contact for Medical and School Records:

Some City Clinic, Dr. Alice Stevenson, Pediatric Pulmonologist
100 Clinic Rd. Some City, YY 12345

PROGRESS NOTE

Some City Clinic, Dr. John Murray, Pediatrician
100 Clinic Rd. Some City, YY 12345

Some City Youth Mental Health Clinic, Dr. Latoya Jones
100 Center St. Some City, YY 12345

Some City Emergency Room, Dr. Caron Washington
546 That St. Some City, YY 12345

Some City Public Schools, Ms. Catherine Davis, Primary School Teacher
Phone: 123-456-7895

Additional Observations:

CW received reports from the evening staff at the shelter that Marshall has been frequently running around the shelter. He has not been sitting still during meals and has been disruptive to the evening routines at the shelter. Evening staff requested that Marshall assist with clean-up after dinner and he was unable to stay on task. They reported that he was very distracted. CW and other shelter staff have frequently observed Marshall coughing and wheezing at the shelter. Ms. Williams has to give him treatments with the nebulizer at the shelter.

Follow-up from this appointment: Requested records from Some City Clinic, Some City Youth Mental Health Clinic, Some City Emergency Room and Some City Public Schools. Recorded status of all requests in the Medical Records Tracking tool.

PROGRESS NOTE

Date: October 10, 2017

Case Worker: Jack Collins

Resident: Kimberly and Marshall Williams

Location: Some City Public Schools

Narrative:

CW met with Ms. Williams at Some City Public Schools. Ms. Williams was called to the school because Marshall was suspended again. She was in need of a ride back to the shelter and so this writer met her there. We discussed the situation that led to the suspension.

Ms. Williams shared that Marshall was suspended for 5 days and it is the second time this month. He was suspended 7-8 times last year and already 5 times this year. The last time was for punching another boy on the bus and this time she said, "They say he was running around the hallways and when they tried to get him to go back into class, he actually ran out of the school and ran across the street to that little drug store on the corner. The security guard went and got him and brought him to the Principal's office and then they called me." She is worried that Marshall might get expelled.

Ms. Williams said that she had stopped giving Marshall his Adderall in September. She is thinking about whether or not to ask the doctor to start the medications again or something else for his anxiety. She described a lot of stress, stomach aches and headaches.

Ms. Williams recounted how disruptive Marshall is in class. The Language Arts and Math teachers both call her to report disruptions in the classroom. They have difficulty controlling his behavior and we will not pay attention, talks all of the time, walks around the classroom, disturbs other students, refuses to do assignments, is disrespectful, and does not follow the classroom rules. Ms. Williams says "they say he is the class clown." Ms. Williams says that she has tried to talk to Marshall about these issues at school and even take away privileges, but that he either won't talk about it, says that he hates school and that his teachers are lying.

CW met with Catherine Davis, Marshall's Primary School Teacher. Ms. Davis had almost completed the SSA-5665 Teacher Questionnaire. She will fax the questionnaire directly to the DDS Examiner and will also send a copy of it to this writer for Marshall's records. Ms. Davis also said that she would ask Jackie Melendez, Classroom Aide to add additional information about what she has observed while working one-on-one with Marshall.

PROGRESS NOTE

Follow-up from appointment: Called the Medical Records departments at Some City Clinic and Some City Mental Health Clinic to check on the status of the request. They both stated that the records should be sent by next week. Called Some City Public Schools to check on the status of the school records request. They are working on getting the archived records from Marshall's initial assessment and will have them within the next 2 weeks.